Terms of Reference for Setting up an Automated Monitoring and Result Measurement (MRM) System for BMMDP

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1. BMMDP Project Background:

The Bangladesh Microinsurance Market Development Project (BMMDP) (formerly BADIP) is a project mandated by the Swiss Agency for Development and Cooperation (SDC). Swisscontact has been appointed as the Managing Agent (MA) to assist SDC in the overall coordination, monitoring, and management of the project. Phase 1 of BMMDP will focus on piloting and testing different insurance products and distribution channels to identify and develop appropriate weather index-based crop insurance products and risk mitigation methods for the agriculture sector (initially, crop and livestock sub-sectors)

in Bangladesh, reaching at least 633,000 insured farmers by 2024.

2. Project Components:

BMMDP Phase 1 is divided into three components:

2.1. Component 1: Crop insurance pilot implemented by SFSA Bangladesh (Crop Surokkha): Under Component 1, Syngenta Foundation for Sustainable Agriculture Bangladesh (SFSA Bangladesh) is responsible for developing appropriate index-based crop insurance products and insurance business models with distribution channels, such as crop input suppliers, contract farming processors and traders, and MFIs; raising awareness to local risk carriers (insurance companies) in crop index insurance and their business potential; partnering with re-insurers in product development and risk pricing, and contributing to the knowledge creation and evidence gathering to improve the knowledge and capacity of public and private insurance stakeholders.

2.2. Component 2: Livestock risk mitigation pilot implemented by PKSF (Livestock Surokkha): Under Component 2, Palli Karma Sahayak Foundation (PKSF) is expected to expand and diversify the livestock mortality insurance operations by the better performing partner organizations (PO) and assess the commercial viability of its evolving social insurance business model. BMMDP will facilitate PKSF in institutionalizing its livestock insurance scheme by operationalizing its insurance unit, building the capacity of PKSF and its PO in scaling up beef-fattening mortality insurance operations, and diversifying into dairy cows, goats, and poultry. The POs will offer veterinarian services and livestock management and financial literacy training to their clients to reduce risks to make livestock insurance affordable.

2.3. Component 3: Capacity Building of Insurance Sector Stakeholders in Bangladesh (Surokkha): Under Component 3, the MA of BMMDP will complement the existing donor and project interventions on crop and livestock insurance. The intention is to gather and disseminate knowledge through various means such as implementing an innovative intervention, doing research, and sharing the gained knowledge through components 1 and 2.

The Monitoring and Results Measurement (MRM) Manual and system primarily deals with components 1 and 2; while component 3 will contribute to knowledge management and capitalization/anchoring
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3. MRM and Its Requirements for Project Activities

The MRM Team will monitor components 1 & 2 and will assist the social insurance operators SFSA and PKSF in meeting fully and in time all output- and outcome-based reporting requirements set by the Swiss Development Corporation (SDC). The MRM team of BMMDP is responsible for preparing outcome reports for SDC, leading results measurement studies, notably on the value-added of insurance and risk reduction services for smallholder farmers according to SDC's evaluation methodologies and preparing case studies as inputs for the knowledge sharing workshops organized under component 3.

The MRM requirements are outlined in detail below:

✓ Planning monitoring & evaluating and documenting project interventions, supporting the preparation of partnership strategies, concept notes, and intervention plans

✓ Support implementation of activities on the ground and support from the MRM Manager on strategic decision-making based on ground realities, ensure that the project delivers all desired targets on time and with quality

✓ Establish and operationalize a performance management framework for monitoring and overseeing various project components in coordination with the implementing partners

✓ Develop and operationalize results chain, monitoring, and results in measurement plan with partner organizations

3. Current Structure of Data Collection and Reporting Method:

i. For a better understanding of the data collection chain, we have discussed the structure under component-2. However, note that all the project components have a similar kind of reporting structure. System specifications thus remain consistent for all components involved.

ii. Under Component-2 of the Project, the Implementing Partner, Palli Karma Sahayak Foundation (PKSF) has 15 Partner Organizations (POs), and these POs have 325 branches spread out all over the country.

iii. The sales representatives from all 325 branch offices collect raw primary data and do a manual input in Excel, which is then collected by their respective PO Head Offices, and the files are consolidated.

iv. The 15 POs then send out the consolidated files (after data validation) to PKSF where all the consolidated Excel files are maintained according to POs and their respective regions. The data file is then sent for the second round of validation before it comes to the Managing Agent, Swisscontact.

v. BMMDP, Swisscontact then uses the data files for analysis and reporting purposes.

5. Objective of Automation and Operationalizing the MRM System

The primary objective for modification of the MRM system is to enhance '**ease of data collection and representation**, **ease of data analysis, sharing and a dashboard for different stakeholders involved.**' The objective of this assignment is to improve and

operationalize the already developed Monitoring and Result Measurement (MRM) System.

Based on the project activities and the huge number of datasets it entails, the MRM system needs an interface that should do the following:

- ✓ Be User-friendly
- ✓ Less time-consuming
- ✓ Speed up the data-entry process by field-level users and BMMDP partners
- ✓ Better representation of data
- ✓ Easy for the Managing Agent to oversee the project activities at PO levels and Partner levels

The IT consultant is expected to improve the existing data recording system to assess impacts generated by the project interventions more effectively and in a timely manner. Moreover, the system should enable the Managing Agent (MA) to carry out planning, analysis, and reporting activities in an efficient manner.

6. MRM System Improvement and Operationalization

The partner IT company is expected to develop a fully automated MRM data aggregation system, keeping in mind that a whole new app and/or system development should only be the last resort to fulfill the below-mentioned requirements.

Rather, the partner IT company is expected to bring ease of data collection to the already existing Excel-File based data entry system (without having to replace Excel-Files) and further improve data consolidation for timely data sharing and efficient analysis which can be represented on a dashboard and ability to use it for analysis and planning.

The table below illustrates the current functionality (As-Is) of the data entry and reporting system, along with expectations from the new system:

Table 1

SL No.	Functionality	Description
6.1.	Data Entry	➢ The first round of data is entered by field officers in each of the Partner Organizations (POs). ➢ The POs then send over excel files to their Head Offices, which are then compiled and sent over to our Partners (Syngenta/PKSF) after validating the data. ➢ Lastly, the data is shared with the MA by Partners every 3 months/ six months. **Expectations from the new system:** The PO level data collection should have more ease, quicker and timely data input with continued use of Excel in an innovative way like voice or handwriting recognition or similar feasible technologies. The Managing Agent should be able to oversee the overall project activities and performance of all the branch offices with regards to timely data entry into the system and send out reminders about deadlines based on pre-defined time benchmarks. An escalation process for laggers who data input within the stipulated time cannot do should be identified by the system and reminders from the MA should go out accordingly.
6.2.	Data Consolidation	➢ The first round of data consolidation is done by PO Head Offices, and a second round of consolidation is done by BMMDP Partners (PKSF/Syngenta) before finally sending it to MA. **Expectations from the new system:** ✓ The system should be able to prepare a consolidated database where data (consolidated excel files) from the PO level is uploaded and is accessible to all relevant stakeholders, including Partner Organizations and the Managing Agent.

6.3.	Data Sharing and Validation	➤ Region-wise POs share data with their respective Head Offices. Head Offices then validate this data and send it over to their main Partner Organization (PKSF/Syngenta) where the second round of data validation takes place. ➤ The Partners then send over these data files to the MA, who then validates the data by hiring an external consultant. **Expectations from the new system:** ✓ The system should have the ability to have a dynamic dashboard for each stakeholder involved where consolidated data files are uploaded and depicted against pre-defined criteria using interactive graphics and made accessible to pre-identified stakeholders.
6.4.	Analysis and Reporting	➤ The Managing Agent receives the data files as well as a technical report containing information on log-frame indicators from the Partners. ➤ Log Frame Indicators are a set of indicators that are reported by the MA to assess the overall project's impact from one semester to the other, also used to capture annual changes. **Expectations from the new system:** ✓ The Partners should be able to report key indicators on the system which should be reflected on the dashboard for the ease of analysis, planning, and reporting by MA.

7. ADDITIONAL REQUIREMENTS:

7.1. Consult with the IT departments of partner organizations listed above to understand the requirements for MRM for the BMMDP Project.

7.2. Test run of the system with Swisscontact and their partners before Pilot Go-Live and full Scale-Up.

7.3. Work in close association with the BMMDP project team and partner organization teams during all phases of MRM system development.

7.4. The new system shall optimize current data collection focusing on the objectives mentioned above and propose automation that is feasible to implement in both rural and urban parts of the country to increase transparency and the efficiency of MRM activities.

7.5. The project shall follow a systematic blended SCRUM and Waterfall project management approach. A broad project activity list along with a timeline can be found in the table below and the applying company shall send a proposal not longer than 15 pages only if the estimated time to complete the project lies within the defined project time limit. Please see further details below.

Table 2

Sl. no	Particular	Time	Remarks
1	Request for proposal	10 May 2022	To be published on both national and international procurement platforms
2	Deadline for proposal submission	29 May 2022	Incoming proposals should have at least two scenarios on how to automate the current MRM process along with detailed Gantt chart of project activities

3	Proposal Review and communication with shortlisted companies for presentation	12 June 2022	Shortlisted companies shall also be receiving a presentation template to present their scenarios in brief.
4	Evaluation and Selection round	15 and 16 June	Online presentation and Question and Answer session with shortlisted companies.
5	Final Negotiation	21 and 22 June	The contract will be awarded post negotiation
6	Project Kick-Off Workshop (day long) with internal stakeholders and project team of the IT company	Either 28 or 29 June	To be held in Dhaka
7	Onboarding of IT company and detailed requirements engineering	03 July – 31 July	Deliverable – Requirements Sign Off
8	Desk Research, programming iterations and prototyping	1 August - 21 August	Deliverable – Demo of To-Be solution to Swisscontact
9	To-Be approval by internal stakeholders	28 August	Deliverable – To be sign off
10	User Acceptance Testing and Training for Pilot Implementation	04 Sept – 18 September	Deliverable – Testing plan and Training Report
11	Trials at pilot implementation sites together with internal and external stakeholders	21 Sept – 28 September	Deliverable – Trial session summary and lessons learnt
12	Rework on lessons learnt and further programming	28 Sept – 09 October	Deliverable – The new To-Be solution

	iterations and testing		
13	Pre-Go-Live activities	09 October – 22 October	Deliverable – Solution delivery plan and terms of Service Level Agreement
14	Go- Live (Pilot)	**23.10.2022**	Deliverable – on time Go-Live
15	Post Go live Phase	23 October – 13 November	Deliverable – "Post Go-Live User Acceptance report on pre-defined parameters" And Customer Support - SLA
16	Project Scale – Up planning and iterations	13 Nov – 11 December	Deliverable – To – Be solution for scale up
17	Testing and Trail of Scale – Up To-Be Solution	18 December – 08 Jan	Deliverable – Trial Plan and Trial Report
18	Pre-GO Live (Full Version)	**22.01.2023**	Deliverable – on time Go-Live
19	Post Go Live Phase	22 Jan – 12 Feb	Deliverable – User acceptance report based on pre-defined parameters
20	Project Closing Phase	12 Feb – 12 March	Deliverable – Lessons Learnt Report

Requirements

The consultant should meet the following qualifications:

• At least 10 years of experience in various kinds of Results Measurement Software Development.
• Familiarity with the financial sector, preferably with the insurance/microinsurance sector.
• Familiarity with Agriculture and livestock sector work would be regarded as an added advantage.
• Proven track record of completing similar assignments.
• Ability to work under pressure and meet deadlines.

Proposal submission requirements

All bidding consultants are required to submit the following:

• A technical proposal (Maximum 5 pages) showing understanding of the assignment, proposed project methodology, assessment tools, timeline with activity plan and deliverables, key staff/consultant profiles, roles, and individual time to be spent in the assignment.

• Submission of an organizational profile (if applicable), with the CVs of key personnel who will be involved in the assignment.
• The bidding organizations must submit documentary evidence demonstrating their legal, taxation, and financial status.
• A financial proposal aligned with the technical proposal, i.e. a proposed budget.

Selection criteria

While the exact set of criteria will usually vary based on the nature of the assignment, the following criteria are generally applicable for the evaluation of the potential consultant/firm:

- Understanding of the assignment
- Professional and technical capacity to carry out the assignment (relevant skills, knowledge)
- Relevant experience in similar projects and/or in the sector
- Experience in working with similar projects.

The following evaluation method will be applicable for the evaluation of the proposal:

− Quality-based evaluation will be applied by an evaluation team comprising of members of the BMMDP project and Swisscontact, Bangladesh country office.
− The technical part of the proposal will be taken for the evaluation and ranked based on the obtained score for the proposals.
− The bidder achieving the highest score in the proposal will be awarded the contract, provided both parties reach an agreement on the final budget in compliance with VfM tenets of SDC/SC. If there is no agreement on the final budget, then the bidder with the second-highest score will be considered for negotiation.

Submission Details

Interested bidders should submit the electronic copy of technical and financial proposals and other necessary documents to: **bd.bmmdp@swisscontact.org** by May 21st, 2022 before 2 PM (Bangladesh Standard Time).

BMMDP Programme reserves the right to accept or reject any or all proposals/applications without assigning any reason whatsoever. Please note that if any applicant does not meet all the above requirements, the application will be disqualified without further evaluation. If required, changes in activities, timeline, and budget, a contract may be amended, based on mutual agreement between SCBD and the contractor.